

Reminders for Completing the FY 2019 Performance Data Form: Module 2 (Performance Measures) & Optional Module 3

LIHEAP Webinar hosted by the Office of Community Services (OCS) in the Administration for Families and Children (ACF) presented by APPRISE under contract to OCS

January 21, 2020

Welcome:

Vikki Pretlow (OCS)

Presenters:

Melissa Torgerson (Verve Associates)

Dan Bausch (APPRISE)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Welcome

- **Purpose of This Webinar**

- To provide a brief refresher on the requirements for the LIHEAP Performance Data Form – Module 2 (Performance Measures) and optional Module 3.
- To provide LIHEAP Coordinators and staff with key reminders and ways to avoid common reporting issues.

- **Audience for This Webinar**

- Coordinators and other staff who have previously completed the Performance Measures.

Webinar Overview

- **Structure of The Webinar**

- 30 minutes to review key information.
- Slides available for download now under “Handouts” in the GoToWebinar Sidebar.
- The webinar is being recorded and will be published on the ACF YouTube channel.

- **Have a question?**

- You are encouraged to ask questions as you have them by typing them into the GoToWebinar “Question” box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.

Before We Begin

What Questions Do You Have on Completing Module 2 (the Performance Measures)?

The screenshot shows the GoToWebinar interface. At the top is a menu bar with 'File', 'View', and 'Help'. Below it is a sidebar with four icons: a right arrow, a phone, a document, and a hand. The main content area has two sections. The 'Audio' section has a phone icon, radio buttons for 'Computer audio' and 'Phone call' (selected), and text for 'Dial: +1 (562) 247-8422', 'Access Code: 978-261-249 #', and 'Audio PIN: 45 #'. Below this is a link 'Problem dialing in?'. The 'Questions' section has a text input field with the placeholder '[Enter a question for staff]' and a 'Send' button. At the bottom, it says 'Test' and 'Webinar ID: 619-143-667' with the GoToWebinar logo.

Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.



Presentation Outline

- | | | |
|----|---|-----------------|
| 1. | Reminders of Reporting Rules for Module 2
(Performance Measures) | Slide 7 |
| 2. | Data Validation and Checks | Slide 9 |
| 3. | Common Reporting Issues & Reminders | Slide 11 |
| 4. | Final Reminders | Slide 19 |

Overview of the LIHEAP Performance Data Form

- The Performance Data Form is an annual report that all state grantees and the District of Columbia must submit to HHS.
- **Module 2 (the Performance Measures)** allows OCS to report information to Congress about LIHEAP impacts.
- **Module 3** is optional.
- **There are no changes to the FY 2019 Performance Data Form.** The requirements are the same as those for the FY 2018 Performance Data Report.
- Grantees can review the prior instructions for reporting each item in the Performance Data Form:
<https://www.acf.hhs.gov/ocs/resource/liheap-action-transmittal-2019-01-performance-data-form-for-fiscal-year-2018>

Reminders of Reporting Rules for Module 2 (Performance Measures)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Reminders of Reporting Rules

- Grantees should...
 1. Collect main heating fuel bill information and electricity bill information from a sample of energy vendors.
 2. Calculate statistics and collect information according to the official instructions.
 3. Explain any unique program features, nuances, or data quality challenges in the “Notes” section

Data Validation and Checks



ADMINISTRATION FOR
CHILDREN & FAMILIES

Data Validations and Checks

OLDC Messages and Review Process

Checks in OLDC Prior to Submission

- Validation checks are programmed into OLDC, and a warning or error message will appear if a check fails. Please review these before you submit.
 - Warning Messages indicate data that may be correct, but require confirmation and additional explanation in the “Notes” section of the form.
 - Fatal Error Messages indicate inconsistent data that must be corrected before grantees are able to submit their report in OLDC.

Checks After You Submit

- APPRISE checks data following submission in OLDC and will e-mail grantees to alert them to any issues or questions based on their review.
- When your report is confirmed as complete, your liaison will accept it in OLDC.
- If you later identify a correction or change is needed, you will need to submit a revision in OLDC.

Common Reporting Issues & Reminders



ADMINISTRATION FOR
CHILDREN & FAMILIES

Common Reporting Issues

Reminder #1 – Calculating Weighted Averages in the “All Households” Column

- The “All Households” values provide the average values across all fuel types.
- Because the number of households with each main fuel type is different, you must calculate the “All Households” column using a **weighted average**. You cannot calculate these values by doing a simple average of the five main heating columns.
- *For more information on weighted averages, see the document on [Calculations for the Performance Measures](#).*
- Grantees have two main options to correctly calculate the averages in the “All Households” column.

Common Reporting Issues

Reminder #1 – Calculating Weighted Averages in the “All Households” Column

- **Option 1:** Use the Excel form that automatically calculates the “All Households” weighted averages based on the information entered for each heating fuel type.
 - An [Excel workbook](#) of the Performance Data Form will auto-calculate the “All Households” column for you once you enter data into the main-heat fuel columns.
- **Option 2:** Calculate the averages directly in your data system using all of the household-level data in your database.
 - Use all households included in Part B to calculate the averages.

Common Reporting Issues

Reminder #2 – Reporting Prevention and Restoration Data

- Section VI and VII should include reporting the following:
 - Section VI: The total number of occurrences where LIHEAP assistance restored a household's energy service.
 - Section VII: The total number of occurrences where LIHEAP assistance prevented the loss of home energy service for a household at risk of losing service.
- The number of occurrences should reflect all types of LIHEAP assistance that restored lost energy service (Section VI) or prevented the loss of service (Section VII).
- A household might have had the loss of energy service prevented or had energy service restored more than once in a year. In that case, you should report each occurrence, rather than counting a household only once.

Common Reporting Issues

Reminder #3 – High Burden Household Identification

- ***High Burden Households:*** The top 25% of households from Part B of Section V with the highest calculated energy burden.
- All grantees must identify high burden households using this definition to ensure consistent reporting.
- There are 5 steps to correctly identify High Burden Households.

Common Reporting Issues

Reminder #3 – High Burden Household Identification

- **Step 1:** For each household included in Part B, calculate the household's *annual total residential energy bill*.
 - Add the annual main heating bill and annual electricity bill together.
 - Verify that the electricity bill doesn't get double-counted when calculating the annual residential energy bill.

Household ID	Main Heating Fuel	Annual Main Heating Bill	Annual Electricity Bill	Annual Total Residential Energy Bill
Household 1	Propane	\$2,800	\$1,200	\$4,000
Household 2	Fuel Oil	\$1,500	\$1,500	\$3,000
Household 3	Electricity	\$1,200	\$0	\$1,200
Household 4	Natural Gas	\$1,000	\$800	\$1,800
Household 5	Electricity	\$1,000	\$0	\$1,000

Note:
Correct -
Electricity bill
was not double-
counted.

Presenter(s):
Dan Bausch

Common Reporting Issues

Reminder #3 – High Burden Household Identification

- **Step 2:** Calculate *energy burden* for each of these households.

$$\frac{\text{Household's Total Annual Residential Energy Bill}}{\text{Household's Annual Income}} * 100$$

- **Step 3:** Assign a value of 100% energy burden to households with income equal to \$0 or with an *annual total residential energy bill* that is larger than the household's annual income.
- **Step 4:** Sort the combined set of ALL households from highest to lowest energy burden.
- **Step 5:** Draw the top 25% of households with the highest energy burden, *regardless of fuel type*.

Common Reporting Issues

Reminder #3 – High Burden Household Identification

Household ID	Main Heating Fuel	Annual Income	Step 1: Annual Total Residential Energy Bill	Step 2: Energy Burden
Household 5	Electricity	\$0	\$1,000	100%
Household 2	Fuel Oil	\$10,000	\$3,000	30%
Household 1	Propane	\$16,000	\$4,000	25%
Household 8	Natural Gas	\$10,000	\$1,500	15%
Household 7	Fuel Oil	\$24,000	\$2,400	10%
Household 6	Electricity	\$10,000	\$800	8%
Household 3	Electricity	\$15,000	\$1,200	8%
Household 4	Natural Gas	\$30,000	\$1,800	6%

Step 5:
Top 25%
Selected

Step 3: Zero-
Income Household
was assigned 100%
energy burden

Step 4: Households
sorted by energy burden

Presenter(s):
Dan Bausch

Final Reminders



ADMINISTRATION FOR
CHILDREN & FAMILIES

Final Reminders

FY 2019 Report Status and Deadline

- There are no changes to the FY 2019 Performance Data Form. The requirements remain the same as those for last year's FY 2018 Form.
- The FY 2019 Performance Data Form is due in OLDC on **January 31, 2020**. This includes Module 1 (Grantee Survey), Module 2 (Performance Measures), and Module 3 (Optional Measures).
- Remember that the Performance Data Form must be:
 - Entered in OLDC
 - Saved in OLDC
 - Certified by the appropriate person
 - Submitted by the appropriate person

Final Reminders

OLDC Resources

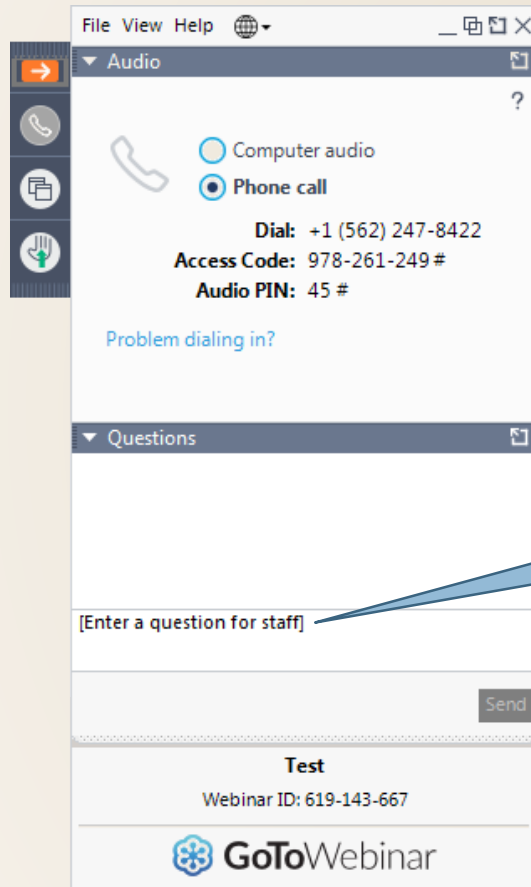
- OLDC is accessed through Grant Solutions.
- Log-in to Grant Solutions at <https://www.grantsolutions.gov/gs>
- Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
- If you need assistance, please contact Grants Center Of Excellence Systems Help Desk:
 - (202) 401-5282 or (866) 577-0771
 - help@grantsolutions.gov

Final Reminders

Support Resources

- OCS liaisons
 - <http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff>
- Grants Center Of Excellence systems Help Desk
 - help@grantsolutions.gov
 - (202) 401-5282 or (866) 577-0771
- APPRISE Team
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050
 - Jorge Mancilla, Jorge-MancillaUribe@appraiseinc.org; 609-252-9009
 - Georgios Anagnostopoulos, g-Anagnostopoulos@appraiseinc.org; 609-252-9055
 - Pragya Chauhan, Pragya_Chauhan@appraiseinc.org; 609-252-9057
 - Melissa Torgerson, melissa@verveassociates.net; 503-706-2647

GoToWebinar Question Box



Enter text here to ask a question.

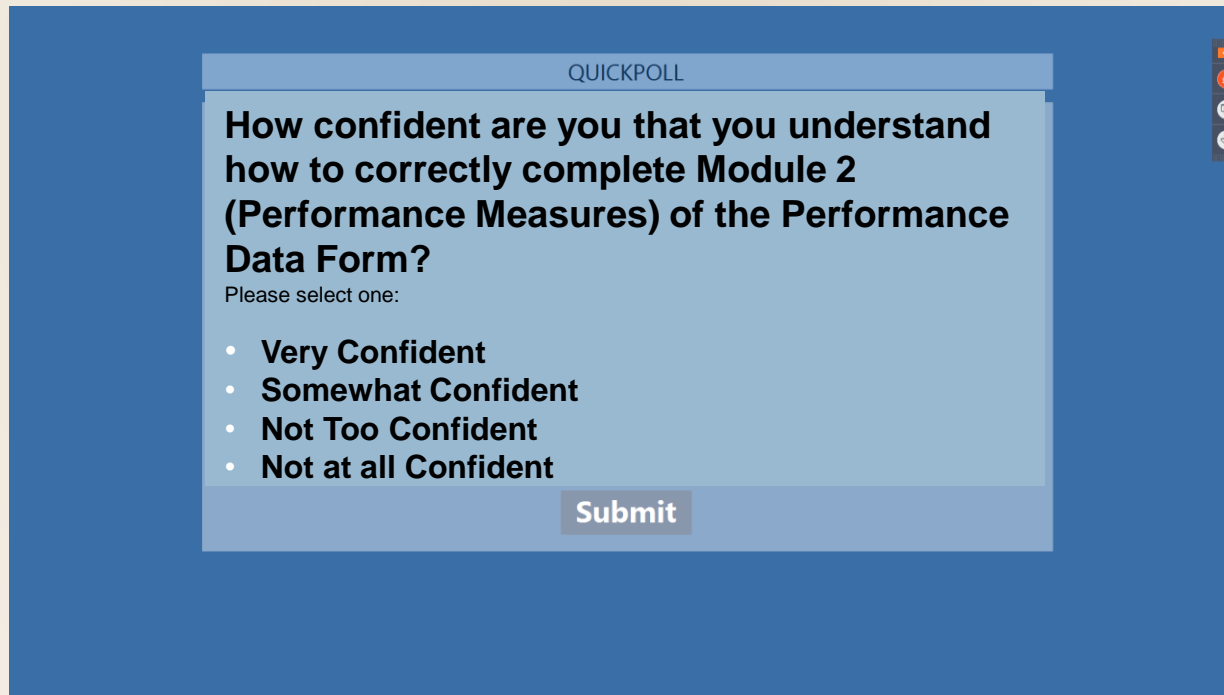
If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.



Audience Poll Question #1

- How confident are you that you understand how to correctly complete Module 2 (Performance Measures) of the Performance Data Form?



QUICKPOLL

How confident are you that you understand how to correctly complete Module 2 (Performance Measures) of the Performance Data Form?

Please select one:

- **Very Confident**
- **Somewhat Confident**
- **Not Too Confident**
- **Not at all Confident**

Submit

The screenshot shows a web-based poll interface. At the top, it says 'QUICKPOLL'. Below that is the poll question in bold. Underneath the question is the instruction 'Please select one:'. There are four radio button options listed: 'Very Confident', 'Somewhat Confident', 'Not Too Confident', and 'Not at all Confident'. At the bottom right of the poll area is a 'Submit' button. On the far right edge of the poll window, there is a vertical toolbar with icons for back, forward, and other navigation functions.

Audience Poll Question

- Review Audience Responses